

Stakeholder Committee (SC) Guide: Evaluation of Capacity Building Activities

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1 Glossary

CB	Capacity Building
CBC	Capacity Building Coordination
CaBuCo	Acronym of the project 23CBC01 Capacity building coordination
CBO	Capacity Building Officer
CMI	Czech Metrology Institute
DI	Designated Institutes
EURAMET	The European Association of National Metrology Institutes
GDPR	General Data Protection Regulation
MSA	Mentoring Scheme Awards
NMI	National Metrology Institutes
RMS	Researcher Mobility Support
SC	Stakeholder Committee
TE	Training events

2 Summary

This document explains the evaluation process of proposals for Researcher mobility support (RMS), Mentoring scheme awards (MSA) and Training events (TE) Proposals are submitted through the platform on the project website <https://cabuco.cmi.gov.cz/>.

The evaluation process is provided 3 times per year for one month after the call is closed. There will be 9 calls in total during the project lifetime.

The evaluation process will be ensured by the Stakeholder Committee without any direct participation of CBO and Coordinator representative and fully in accordance with this Guide. The procedure designed assures that evaluation will be objective, professional and without any threat of risk of interests. Essential evaluation criteria are: 1. Excellence, 2. Impact/Benefit for metrology and 3. Efficiency of the implementation (only for RMS applications).

3 Scope

This Guide explains how to evaluate proposals for Capacity Building activities and the responsibilities of the people involved.

4 Roles and Responsibilities

4.1 Stakeholder Committee

The Stakeholder Committee has representatives of EURAMET Bodies and NMIs/DIs and all members of the SC come from the EURAMET community. CMI, in liaison with the EURAMET bodies, sets up the Stakeholder Committee with a specific focus on capacity building.

SC consisting of at least 7 members, including:

- Coordinator 23CBC01 project (Coordinator)¹
- EURAMET Capacity Building Officer²
- Representative of EURAMET BoD-WGCB³
- Representative of EURAMET European Metrology Networks (EMNs)³
- Remaining members from the EURAMET NMI community, with sufficient geographic spread and having in mind different development stage of the institute ³

The selection criteria for SC members were discussed and formulated at subsequent meetings

- 18th EURAMET General Assembly, Teddington, UK, 5 June 2024
- 22nd Meeting: Joint Meeting BoD/TC Chairs/EMN Chairs/WG Convenors, 14 Feb 2024, CEM, Tres Cantos (Spain)
- BoD Working Group for Capacity Building: Annual Meeting 2023, 04 to 06.10.2023, BoM, Skopje
- Several meetings between CMI and EURAMET Secretariat

The superscripts indicate the roles of each member (see the table below) Although the expected number of Stakeholder Committee members is at least 7, the number of SC members required to evaluate an application will be 3 members. This will provide SC with sufficient flexibility to avoid possible conflict of interests, absences, or lack of response from its members. The SC will evaluate the proposals with impartiality and objectivity. Each proposal will be assigned to external reviewers from the SC according to their fields of expertise. The CBO and the Coordinator will not participate in the evaluation process.

4.2 Evaluators

The CaBuCo project Coordinator appoints three independent experts from the SC who will evaluate the assigned CB activity proposal.

The Coordinator and SC takes all reasonable steps to ensure that evaluators are not exposed to a conflict of interest between their own research/commercial. All SC members must adhere to the Code of Conduct and sign the Code of Conduct and Declaration (template in the attachment of this Guide) before starting any judging.

As part of their evaluation duties each evaluator must:

- complete, sign and email a copy of Form Code of Conduct and Declaration to the Coordinator prior to taking part in the evaluation process
- perform their work
 - independently and in a personal capacity i.e. evaluators do not represent either their employer or country
 - impartially and treat all proposals equally i.e. proposals must be evaluated impartially on their merits irrespective of their origin or the identity of the applicants
 - objectively evaluate each proposal as submitted i.e. on its merit as-written and not its potential if certain changes were to be made
 - accurately and make their judgement against the evaluation criteria and nothing else i.e. do not suggest additional partners, additional work packages, reduction of resources
 - consistently and apply the same judgement to all proposals.
- take all measures to prevent any situation where the impartial and objective implementation of their work is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest (a conflict of interest)
- treat confidentially all data, documents or other material (in any form) that is disclosed to them in writing, electronically or orally in relation to the evaluation. In addition, the evaluators is responsible for ensuring adequate protection of all hardcopy and electronic documents and information (made available to them) and for returning, erasing, or destroying all confidential information after the end of the evaluation

The Coordinator liaise with the evaluators to ensure administration and logistics. Where an evaluator identifies a conflict of interest (at any stage during the evaluation process) he/she must immediately inform the Coordinator.

4.3 Rules of procedure of the Stakeholder Committee

Task

The Stakeholder Committee is responsible for evaluation process of the submitted applications.

Chairperson

The Stakeholder committee shall elect an SC Chair and one deputy SC Chair by simple majority of the valid voting power. Abstentions are regarded as invalid votes and therefore not as cast votes. The SC Chair and deputy SC Chair have to be elected separately and by ballot. In the event of a tied vote, the higher number of supporting SC members shall be decisive.

Responsibilities of the SC Chair and the deputy SC Chair

The SC Chair will chair the meetings of the SC Committee.

The deputy SC Chair shall be the representative of the SC Chair in case of his or her absence.

The SC Chair or deputy SC Chair communicates with the CaBuCo Coordinator and they coordinate all the relevant processes using the tools of the project web site.

Meeting procedure

Convocation - the SC Chair in collaboration with coordinator and CBO decides on the date and place of the next meeting (online or in person) of the SC.

A quorum shall exist at an SC meeting if at least half of the “voting power” is present. the SC Chair or deputy SC Chair, Coordinator and CBO should be present at all meetings.

Reports

The Coordinator will take lead on writing of “Reports/Minutes” for all provided meetings of the CS Committee. Each participant of a meeting will get the reports for that part he or she was allowed to attend. The SC members will get a copy of the reports. The reports shall be treated confidentially unless otherwise agreed in advance.

The meetings of the SC Committee are assembled in writing or by e-mail by the SC Chair or in case of his or her absence by the deputy. The SC members will be asked to inform the Coordinator in writing of items they wish to be included in the agenda. To SC members will be sent a draft agenda before the meeting.

5 Documents of proposal

The evaluation is preformed through the online web platform. For evaluation, evaluators receive the documents sent by the applicants for funding of individual CBC activities.

5.1 Research Mobility Support

An RMS application includes the following information:

1. RMS Application details (submitted in the online application)
 - Application details
 - Budget proposal
 - Schedule
2. RMS Proposal (as attachment to the online application)
 - Overview and need of the project
 - Technical work
 - Outcomes and impact
 - Quality and efficiency of the implementation
3. Cover letter (as attachment to the online application)
4. CV (as attachment to the online application)

More details are given in the RMS Applicants Guide (RMS-G-01).

5.2 Mentoring Scheme Awards

The MSA application includes the following information:

1. MSA Application details (submitted in the online application)
 - Application details
 - Budget proposal
 - Schedule
2. MSA Proposal (as attachment to the online application)
 - Overview and need of the work

- Work activities in each organisation
 - Outcomes and impact
3. Cover letter –(as attachment to the online application)
 4. CV (as attachment to the online application)

More details are given in the MSA Applicants Guide (MSA-G-01).

5.3 Training Events

The application to organise a training event (courses, workshops and summer schools) includes the following information:

1. TE application details (submitted in the online application)
 - Application details
 - Budget proposal
 - Schedule
2. TE proposal (as attachment to the online application)
3. Cover letter - (as attachment to the online application)
4. Draft program (as attachment to the online application).

More details are given in the TE Applicants Guide (TE-G-01).

6 Evaluation process

Each proposal will be assigned to three impartial SC members for review. (but not the Coordinator and CBO).

Evaluation of CB applications will follow the SC requirements and consist of these steps:

Step	Responsible	Action	Period
Step 1	Coordinator	Perform eligibility criteria checks	2 weeks
Step 2	Stakeholder committee	Review and mark against the following criteria: 1. Excellence, 2. Impact /Benefit 3. Efficiency of the implementation criteria (only for RMS applications)	2 weeks
Step 3	Stakeholder committee	Prioritise and decide which applications are selected for funding.	

The proposals will be evaluated by the SC with a go/no go conclusion. The applicants will be informed by letter about the result of the evaluation. A contract process will be initiated with successful applicants.

6.1 Evaluation criteria

The evaluation criteria for proposals are:

1. Excellence
2. Impact/Benefit for metrology
3. The efficiency of the implementation (only for RMS applications)

The evaluation criteria of Excellence, Impact, and Efficiency of the Implementation are key elements for assessing project proposals in many funding frameworks, including the European Partnership on Metrology.

For RMS are key three criterion: Excellence, Impact and the efficiency of the implementation.

For MSA and Training events are key two criterion: Excellence and Benefit (to organisation).

Here's a breakdown of each:

1. Excellence

This criterion assesses the quality, ambition, and clarity of the project proposal. Key aspects include:

- Clarity and importance of the objectives: Are the proposal goals well-defined, and do they address real challenges?
- Innovative approaches and methodology: Does the proposal present novel concepts, approaches, or methods that go beyond the current state-of-the-art?
- Scientific and technical soundness: Is the methodology rigorous, and does the proposal demonstrate a strong understanding of the subject matter?
- Contribution to advancements: Will the project make a significant contribution to the field or help solve a major problem?

2. Impact/Benefit for metrology

This criterion focuses on the potential effect of the project on stakeholders, the community, and broader societal challenges. Elements assessed include:

- Relevance to end-users or beneficiaries: Who benefits from the project, and how impactful is the outcome for them (e.g., NMI/DI, industry, society)?
- Potential for long-term benefits: Are the impacts sustainable, and can they influence future developments?
- Potential benefits for organising institution (increase of visibility, services)

3. Efficiency of the Implementation

This criterion evaluates how well the project plan is designed and whether it can be carried out effectively with the available resources. Key factors include:

- Coherence and effectiveness of the work plan: Are the tasks, deliverables, and timelines realistic and logically structured?
- Risk management: Are potential risks identified, and are there appropriate mitigation strategies in place?

In a typical evaluation, each of these criteria would receive a score based on how well the proposal addresses them. Strong proposals need to demonstrate excellence in all two/three areas, with clear and compelling evidence of the project's quality, potential impact, and feasibility.

6.2 Prior to evaluation

CaBuCO project will check the eligibility of each proposal and only eligible proposals are

evaluated. Where eligibility is not met the proposal will be withdrawn and the proposers informed. If ineligibility is discovered at a later time during the evaluation process, the proposal will be withdrawn and the proposers informed.

Where there is a doubt on the eligibility of a proposal, the Coordinator reserves the right to proceed with the evaluation, pending a final decision on eligibility. The fact that a proposal is evaluated in such circumstances does not constitute proof of its eligibility.

6.3 Evaluation platform

The entire evaluation process will take place via the evaluation platform of the CaBuCo website. Each evaluator will be emailed by the Coordinator with registration details and links to the proposals to be judged. After registration, the evaluator will find the online evaluation form and all proposal documents for download on the web platform.

The evaluators should use the following information:

- familiarize with the evaluation criteria and read the evaluation form as needed.
- read all proposal documents assigned to them and form an opinion on each proposal.
- email to Coordinator, if they discover a conflict of interest or cannot evaluate the project for other reasons or if they find that the research is outside their area of expertise.

However, please note that it is beneficial to have some evaluators with general rather than very specific expertise.

6.4 Evaluation scoring

Each evaluation criterion must be scored in the range 0 – 5 (see table below). The whole range of scores should be used.

0	The proposal fails to address the criterion or cannot be assessed due to missing or incomplete information
1	Poor: the criterion is inadequately addressed or there are serious inherent weaknesses
2	Fair: the proposal broadly addresses the criterion but there are significant weaknesses
3	Good: the proposal addresses the criterion well but a number of shortcomings are present
4	Very Good: the proposal addresses the criterion very well but a small number of shortcomings are present
5	Excellent: the proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor

Table 1: Range of evaluation criteria

The threshold for the individual criteria is 3. If a criterion has scored less than this, the evaluator does not recommend the proposal for funding.

Consensus comments must be given by evaluators to support the scores given for each evaluation criterion and in order to provide feedback to the Coordinator.

The CBO and the Coordinator will not participate in the evaluation scoring.

The evaluator may or may not complete the evaluation form all at once. After saving, he can

return to it again. Please note that once the form is submitted, the form is no longer available.

6.5 Prioritising

The evaluation system requires that at least two evaluators must recommend the proposal for funding. The overall threshold, applying to the sum of the individual scores of all three evaluators is 30 for RMS proposals and 20 for MSA and TE proposals.

The Stakeholder Committee makes the final assessment of the accepted proposals at the Stakeholder Committee meeting.

6.6 Final ranked list

The project Coordinator will publish the final list of successful applications for Research Mobility Support, Mentoring Scheme Award and Training event recipients and will send notification letters to all applicants.

6.7 Estimated allocation of funds to all instruments

Capacity building instrument	Total funding
Researcher Mobility Support (€)	403 375
Mentoring Scheme Awards (€)	84 000
Training courses, Workshops, Summer schools (€)	253 300

The Project budget for each instrument will be distributed equally for each year and confirmed by the SC. In case of too many accepted proposals, SC will suggest to agree on following scenarios:

- ✓ Scenario A – to increase the budget on the current year the CBC activity will take place;
- ✓ Scenario B – move the application to next year/call and postpone the start date of the CBC activity to next year;
- ✓ Scenario C – relocation across instruments in each year;

7 Personal data and confidentiality

All applications must be kept securely and confidential.

Applications will not be made available to the SC, except for the purpose of evaluation only. The SC members will be required to maintain confidentiality of all information contained within the applications they will receive and evaluate, and of the evaluation outcomes. Applications will only be sent to SC members who have completed, signed and returned a **Code of Conduct and Declaration** (see Annex I of this Guide).

SC members will be required to delete or destroy their versions of the application and evaluation documents once the evaluation is complete.

The CaBuCo project processes personal data of the Stakeholder Committee that is relevant and essential to the CaBuCo project activities, in accordance with [the Privacy Policy](#) and GDPR regulations.

Following range of personal data of the Stakeholder Committee is collect by the Project Coordinator:

- **Identification data:** title, name and surname,
- **address data:** delivery address, phone number, e-mail address,
- **other personal data:** employing organisation, email communications, evaluation of applications, access data to the CaBuCo project evaluation platform.

Special categories of personal data are not processed.

Identification data of the Stakeholder Committee members will be publicly available on the CaBuCo project website. All other personal data of the Stakeholder Committee will be kept confidential. Evaluations of individual applications and names of evaluators will not be sent to the proposers and will not be published.

The CaBuCo project Coordinator shall retain data for no longer than necessary for the CaBuCo project activities, at the latest for the period stipulated by the relevant legal and internal regulations.

8 Further information

The project Coordinator reserves the right to cancel negotiations and Grant Agreements for RMS, MSA and TE if the associated project negotiations or Grant Agreements fail, or if the funding allocated for each year is no longer available to the project Coordinator.

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